

CBT Chapters

- ✓ The Off-boarding Process
- ✓ Employee Separation Checklist
- ✓ Employee Benefits
- Final Exam

Introduction

Earlier you learned about the importance of welcoming your new employee through an organized process, called On-boarding. That process helped to assimilate the new employee into your work unit.

Now, you will learn about the Off-boarding process to be followed when an employee leaves the State. Making the employee's departure as operationally seamless as possible, while treating the employee with respect, will limit the State's liability and leave the door open for the possible return of a high performing employee.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Your Involvement

As a supervisor, your involvement in the Off-boarding process depends on your agency's policies and procedures. Some agency Human Resources offices handle the entire Off-boarding process, requiring little involvement from the supervisor. However, your presence and communication with the employee as he/she leaves your agency will always be critically important.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Employee Separation Checklist

Your agency may have a Separation Checklist that guides you through Off-boarding an employee. If not, the Sample Separation Checklist below can be used as a reference. Your agency may have unique items not covered on this checklist, so be sure to check with your Human Resources office before embarking on the Off-boarding process.

[Click here to open the Sample Separation Checklist .](#)

It's important both you and your employee sign the checklist after all items have been addressed. The checklist should then be placed in the employee's official personnel file, and the employee given a copy.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Chapter Summary: The Off-boarding Process

In this chapter, you received an overview of the Off-boarding process. Next, let's look at specific tasks you should accomplish when an employee leaves your agency.

Remember, your Human Resources office can assist in this process.

Click the next arrow to continue the course.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Employee Separation Checklist

Is that it, just follow the checklist?

That's easy.



Not quite. There are other things you should pay attention to. Let's take a look at these tasks on the following pages.

Click next to continue.

CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Written Letter of Resignation

The State requests a written letter of resignation with a two week notice from employees who are voluntarily resigning. This letter should be forwarded to your agency's Human Resources office so the appropriate paperwork can be completed and official employee records can be updated.

This letter of resignation will be placed in the employee's official personnel file along with his/her forwarding address, email and phone contact information.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Computer Workstation

Much of an employee's transition of work before leaving will involve going through the drives and files on his/her workstation. Any personal files kept on the employee's workstation should be deleted. Work to be accessed by others needs to be moved to the appropriate shared drives. As the supervisor, you should schedule time with your employee prior to the last day worked to make certain all current, pertinent documents are forwarded to you or your staff.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

List of Current Projects

Depending upon the level of the position, you may or may not be aware of all projects your employee has been working on. It would be wise to ask him/her to prepare a list of current projects detailing any outstanding issues along with recommendations on how to handle them. This exercise will limit potential surprises after the employee leaves.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Return of State Property

All State-owned property must be returned and accounted for prior to the employee's departure. This may include laptops, projectors, calculators, cell phones, pagers, etc. Be sure these items are immediately stored in a secure place, and that the separation checklist reflects these items were collected.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

State Manuals and Documents

All State manuals and documents the employee had access to in the course of his/her work remain the property of the State and should not be taken by the employee. Intellectual property, or material created by the employee while employed by the State, generally remains the property of the State. Check with your Human Resources office or legal counsel if this is disputed by the employee.

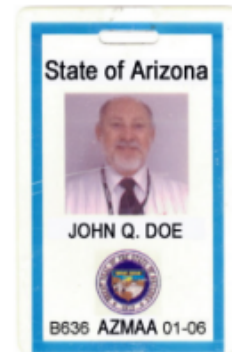


CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

State ID Badge, Transit Pass, and Parking Access

On the last day worked the employee's State badge and transit card, if he/she has one, must be turned in along with any parking access cards or permits. Once again, this must be documented on the checklist that is signed after all materials are collected.

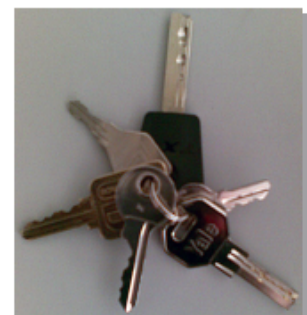


CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Keys and Locks

Collect all keys or pass cards the employee has allowing access to buildings, storage areas, etc. It's important to note that if the employee is being dismissed under adversarial circumstances, certain risks must be assessed and addressed prior to the dismissal. This may include notifying law enforcement and having locks, phone numbers or pass codes changed, etc. Work with your Human Resources office prior to the dismissal to address these potential risks.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Additional Items

State-owned uniforms and other items that may be unique to your agency and work unit should also be added to the checklist and collected, if applicable.

Additionally, many agencies have a tuition reimbursement policy and/or a training reimbursement policy requiring employees to pay back a pro-rated amount if the employee leaves the agency within 12 months. Check with your Human Resources office if your employee has been a recipient of these benefits.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Personal Belongings

The employee should remove personal belongings before the last day worked. As a supervisor, you may facilitate this by inquiring if the employee needs help packing or transporting belongings to his/her car. If you do offer this assistance, please ensure to be polite and diplomatic during this process.

If an employee abandons his/her job and personal belongings are left behind, an inventory of the items should be performed and the employee notified by certified mail that arrangements need to be made for the belongings to be picked up. A deadline for this should be established. Check with your Human Resources office regarding disposing of or surplus items that are left behind.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Voice and Email Forwarding

The message your employee communicates to internal and external customers after he/she departs is very important. Ensure the employee leaves a message on voice mail and email indicating he/she is no longer in the position. These messages should provide new contact information for the individual who will be assuming responsibility for the position. Be sure to confirm the messages are appropriate. Or, you may choose to have all calls and emails automatically forwarded to another employee.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Chapter Summary: Employee Separation Checklist

In this chapter, you learned more about the Separation Checklist and additional tasks to be completed when an employee leaves your agency.

The next chapter covers processing employee benefits and final pay.

Click the next arrow to continue the course.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Retiree Accumulated Sick Leave Program

If your employee is retiring and has a sick leave balance of 500 hours or more, he/she should contact the ADOA General Accounting Office at 602-542-6222 to inquire about the Retiree Accumulated Sick Leave Program (RASL). This program allows eligible employees to receive payment for a portion of their unused sick leave upon retirement.



Information about RASL can also be accessed on the YES website. Click on the RASL link below to view this information.

[Click here to visit the RASL website.](#)

CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

COBRA

All employees who were receiving health benefits through the State prior to separation are eligible under Federal law for continuing healthcare coverage (COBRA) at their own expense. If the employee has questions about COBRA or other benefits, refer them to your agency benefit coordinator or to the ADOA Benefit Services Division at 602-542-5008. Additional information can also be accessed on the ADOA Benefit Services Division website.

[Click here to open ADOA Benefit Services Division COBRA website.](#)



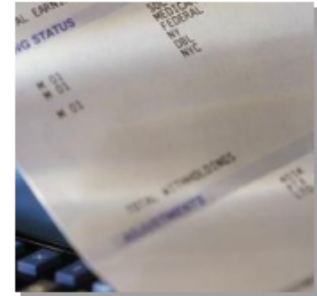
CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Final Pay

Arizona payroll law requires that involuntarily terminated employees receive final pay within seven working days and voluntarily terminated employees receive final pay by the next regular payday. Involuntarily terminated employees may have the option of picking up their final paycheck from a designated payroll coordinator at your agency or having the final pay mailed to a provided address. If the final pay is mailed, it must be sent certified, return receipt requested.

The employee's final paycheck will include payment for accumulated annual leave.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Access to the YES Website

Upon departure from the State, former employees will have access to the YES website for a period of four years. This access will enable them to view and print previous paychecks as well as W-2 forms. State training records will also be accessible in YES for two years after separation.



CBT Chapters

- The Off-boarding Process
- Employee Separation Checklist
- Employee Benefits
- Final Exam

Chapter Summary: Employee Benefits

In this chapter, you learned about processing final benefits and pay for employees leaving your agency.

The next section of this CBT is the final exam.

Click the next arrow to continue the course.



Final Exam

Assess
Your

Knowledge

This final examination is made up of 10 questions. You will need a minimum score of 70%, or 7 correct answers, to successfully pass this examination.

Click the Next button to proceed to the final examination.

